PCORI Online User Manual: Submitting an Application

Improving Methods for Conducting PCOR

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About PCORI Online

[PCORI Online](#) supports PCORI Funding Announcements (PFAs), application submission, and PCORI's review process. Before you begin, please note the following:

- To apply to a PCORI funding announcement you must have an account in the system. If you do not have an account, follow the [Create an Account](#) instructions. If you have an account and have forgotten your password click "Reset or create password" to receive your new password via email.

- The PCORI Online is compatible only with [Safari](#) and [Chrome](#) browsers.

- To complete all sections of your application, use the left-side tabs or the "Previous" and "Next" buttons at the bottom of the window.

    - To save your work, click the "Save and Review" tab and then the "Save and Review" button. **Be sure to save your work before closing the browser window or it will be lost.**

- If you run into technical difficulties using PCORI Online, please contact us at pfa@pcori.org.

Log Into PCORI Online

You must use PCORI Online to submit your application. **To complete your application, you must have previously submitted a Letter of Intent (LOI) to PCORI**. (Note that all LOIs must be approved by PCORI prior to the submission of an application. Refer to the PFA for further guidance.)

- To login, go to pcori.fluxx.io
- Enter the username and password you used to submit your LOI
- If you forgot your password, click on "Reset or create password"

Welcome to PCORI Online

Login Now:

Username

Password

Sign in

Reset or create password

Forgot your password? Click this button to retrieve it.

Technical Note: Please use Chrome or Safari browsers.

If you are a new user, please register by clicking on the "Create an Account Now" button.

If you are a reviewer or have applied to PCORI in the past, you do not need to create a new user account. Please click the "Reset or create password" link to the left to receive your new password.

Current Announcements

Locate Your Application
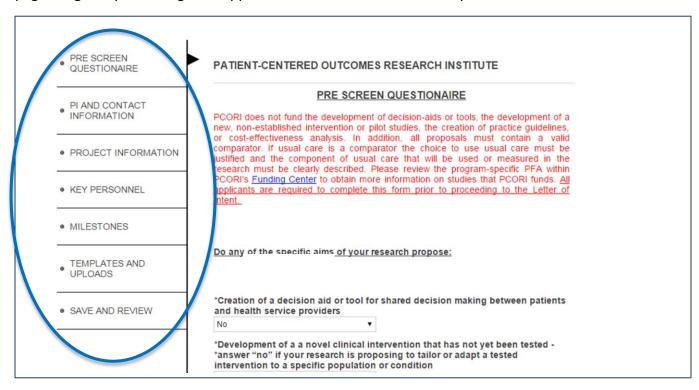
To begin your application, click the yellow pencil icon next to the request number. The application includes previous contact and project information from the LOI and requires additional information.

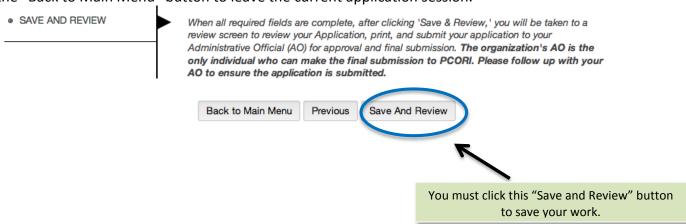Click the yellow pencil icon to begin your application.

Create Your Application

Use the left-side navigational links and the "Previous" and "Next" buttons at the bottom of the pages to guide you through the application creation and submission process.

![pcori logo]

Save Your Application

While working on your application, you can save your work at any time. To save your work, go to the "Save and Review" tab and click the "Save and Review" button. **Please be sure to do this before closing the browser or your work will be lost.** After saving your work, you may click on the "Back to Main Menu" button to leave the current application session.

- SAVE AND REVIEW

➤ *When all required fields are complete, after clicking 'Save & Review,' you will be taken to a review screen to review your Application, print, and submit your application to your Administrative Official (AO) for approval and final submission.* **The organization's AO is the only individual who can make the final submission to PCORI. Please follow up with your AO to ensure the application is submitted.**

| Back to Main Menu | Previous | Save And Review |

You must click this "Save and Review" button to save your work.

To return to a saved draft application, click on the yellow pencil icon on the landing page.

	Amount Requested	Date Created	Program	Status
R-1501-2_1 Improving Methods Test	$1,010,000.00	1/20/2015	Improving Methods for Conducting PCOR	Application: In Progress Withdraw Submit to AO

Click on the yellow pencil icon to return to your application.

Status of the application is "In Progress" until all required fields are completed and the application is submitted to the Administrative Official.

![PCORI logo]

Pre Screen Questionnaire

Please review the responses you provided in your LOI. **All questions with asterisks are required**.

This disclaimer will appear regardless of the answers you provide.

- KEY PERSONNEL

- TEMPLATES AND UPLOADS

- SAVE AND REVIEW

PRE SCREEN QUESTIONAIRE

PCORI does not fund the development of decision-aids or tools, the development of a new, non-established intervention or pilot studies, the creation of practice guidelines, or cost-effectiveness analysis. In addition, all proposals must contain a valid comparator. If usual care is a comparator the choice to use usual care must be justified and the component of usual care that will be used or measured in the research must be clearly described. Please review the program-specific PFA within PCORI's Funding Center to obtain more information on studies that PCORI funds. All applicants are required to complete this form prior to proceeding to the Letter of Intent.

Do any of the specific aims of your research propose:

*Creation of a decision aid or tool

| No ▾ |

*Development of a new intervention that has not yet been tested - *answer "no" if your research is proposing to tailor or adapt a tested intervention to a specific population or condition

| No ▾ |

*Creation of practice guidelines

| No ▾ |

*Conducting a formal cost effectiveness analysis or directly comparing the costs of care between two or more alternative approaches to providing care

| No ▾ |

If you answered "Yes" to any of the above questions, your LOI may be deemed non-responsive if submitted. We strongly encourage you to reassess your proposal and to review the objectives of your PFA within PCORI's Funding Center.

[Back to Main Menu] [Next]
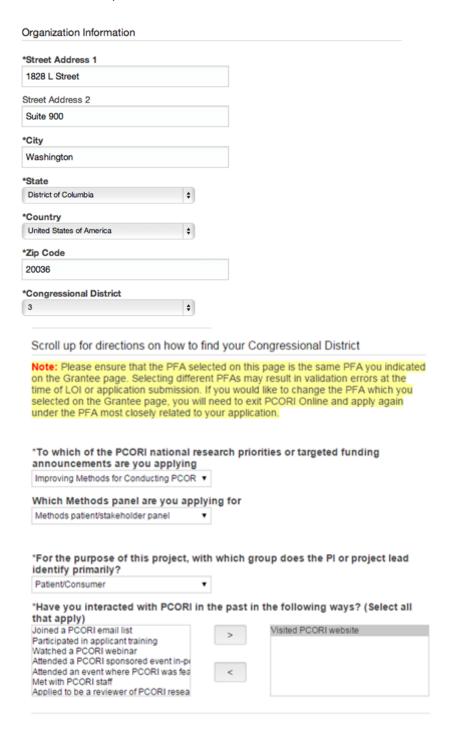
Principal Investigator and Contact Information

Please review the information that was entered with the submission of your LOI. You may edit the information, if needed.

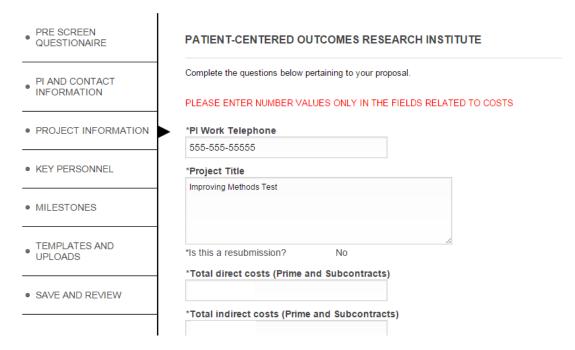**Note that Organization, Principal Investigator (PI), and Administrative Officer (AO) information are <u>required</u> for application submission. The PI and the AO <u>cannot</u> be the same person.**

Review information previously entered at LOI.

Click "Add New" to add a PI, Administrative Officer, or PI Designee that is not in the dropdown list

Organization Information

Please review the information that was entered with the submission of your LOI. You may edit the information, if needed.

Organization Information

*Street Address 1
1828 L Street

Street Address 2
Suite 900

*City
Washington

*State
District of Columbia

*Country
United States of America

*Zip Code
20036

*Congressional District
3

Scroll up for directions on how to find your Congressional District

Note: Please ensure that the PFA selected on this page is the same PFA you indicated on the Grantee page. Selecting different PFAs may result in validation errors at the time of LOI or application submission. If you would like to change the PFA which you selected on the Grantee page, you will need to exit PCORI Online and apply again under the PFA most closely related to your application.

*To which of the PCORI national research priorities or targeted funding announcements are you applying
Improving Methods for Conducting PCOR ▼

Which Methods panel are you applying for
Methods patient/stakeholder panel ▼

*For the purpose of this project, with which group does the PI or project lead identify primarily?
Patient/Consumer ▼

*Have you interacted with PCORI in the past in the following ways? (Select all that apply)

Joined a PCORI email list
Participated in applicant training
Watched a PCORI webinar
Attended a PCORI sponsored event in-p
Attended an event where PCORI was fea
Met with PCORI staff
Applied to be a reviewer of PCORI resea

>

<

Visited PCORI website

Review Additional PI Information

Review the PI information entered with the LOI. You may edit the information, if needed. Use the "Next" button at the bottom of the page to continue to the next section.

*To which of the PCORI national research priorities or targeted funding announcements are you applying?

Improving Methods for Conducting PCOR ⬍

*Please select which Improving Methods for Conducting PCOR announcement you are applying for

PROMIS-focused ⬍

(FOR GENERAL IMPROVING METHODS ONLY) To which merit review panel is this application being submitted for consideration? Please see the Improving Methods Application Guidelines for additional information on these review panels.

General and design-specific analytic method: ⬍

*For the purpose of this project, with which group does the PI or project lead identify primarily?

Patient/Consumer ⬍

*Have you interacted with PCORI in the past in the following ways? (Select all that apply)

Joined a PCORI email list		Applied to be a reviewer of PCORI research
Visited PCORI website	>	Served as a PCORI merit reviewer
Participated in applicant training		
Watched a PCORI webinar		
Attended a PCORI sponsored event in-pe	<	
Attended an event where PCORI was featu		
Met with PCORI staff		
Applied for PCORI research funding		

Principal Investigator Information
Please respond to questions regarding the Principal Investigator's research experience and prior funding. All fields are required.

*Position Title

Deputy Director of Urology

*Degree

AAS		MD
AB	>	MPH
APRN		
BA		
BC		
BCH	<	
BCHIR		
BM		

*Did the Principle Investigator complete his or her terminal research degree or medical residency within the previous 10 years?

Yes ⬍

*How many years of research experience does the PI or project lead have after attaining his or her terminal degree?

10+ Years ⬍

*How many years of research experience does the PI or project lead have related to this field of research?

10

*Approximately how many grants/contracts have you had funded as the PI or project lead?

6 - 10 ⬍

*Total dollar amount (direct costs) for largest grant/contract for which you were the PI:

$1.1 to 5 million ⬍

![pcori logo]

Project Information

Enter the projected start and end dates of the project by clicking on the calendar icon.
Enter additional project information questions. Refer to the PFA and the Application Guidelines,
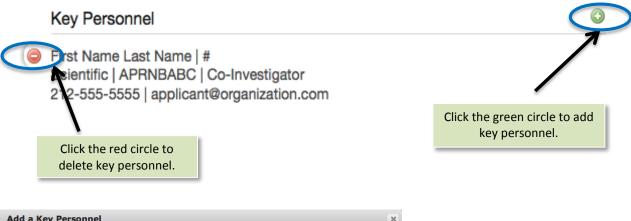found on the PCORI Funding Center, for additional guidance.
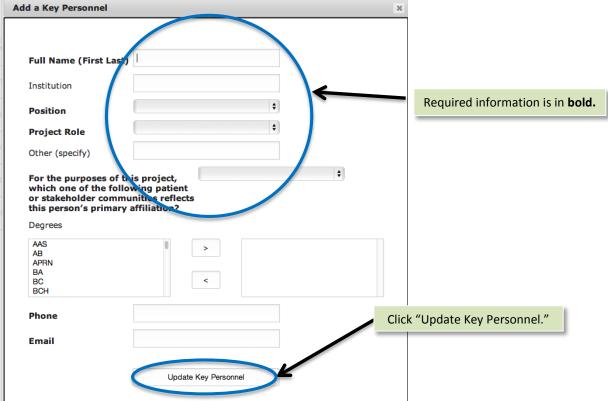
All fields are required.

Key Personnel

- To add key personnel: click on the plus sign, enter key personnel information, and click
  "Create Key Personnel."
- To remove key personnel: click on the minus sign that appears when you scroll the
  cursor over a name.
- **Note: After you click "Create Key Personnel" you cannot go back to edit any
  information. If there is an error, you must remove the entry and create a new one.**

Key Personnel

⊖ First Name Last Name | #
Scientific | APRNBABC | Co-Investigator
212-555-5555 | applicant@organization.com

Click the green circle to add key personnel.

Click the red circle to delete key personnel.

Add a Key Personnel

Full Name (First Last)

Institution

Position

Project Role

Other (specify)

For the purposes of this project, which one of the following patient or stakeholder communities reflects this person's primary affiliation?

Degrees

AAS
AB
APRN
BA
BC
BCH

Phone

Email

Update Key Personnel

Required information is in **bold.**

Click "Update Key Personnel."

Please confirm that you have added all Key Personnel by clicking the checkbox. You may be asked to complete additional key personnel question(s).

After finishing these steps, click "Next" to continue to the next section of the application.

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☑ *Please confirm that you have added all your Key Personnel.

Key Personnel   ⊕

Name your primary patient partner(s) on this project

[   ]

Name your primary stakeholder partner(s) on this project

[   ]
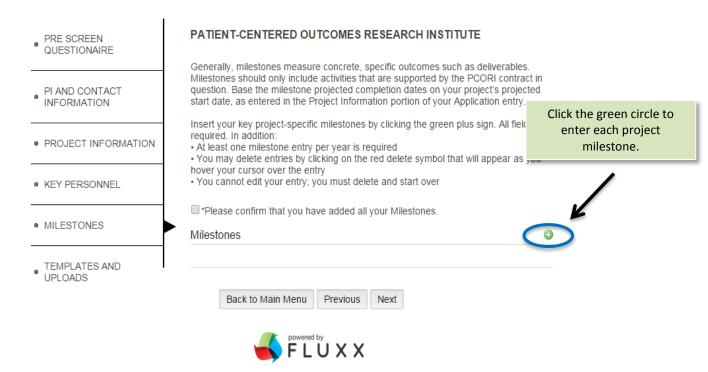
*Will the patient or stakeholder partners engaged in the study receive financial
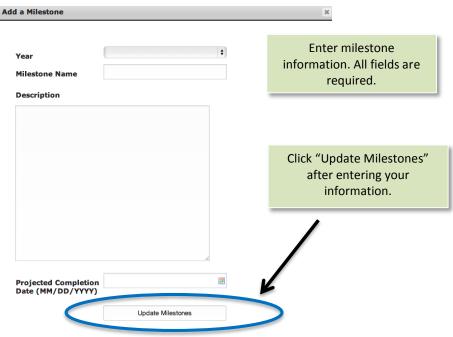compensation for their role in this project?

[N/A   ⬍]

After finishing these steps, click "Next" to continue to the next section of the application.

![PCORI logo]

Milestones

Enter project milestones by clicking on the plus sign in the bottom right corner. Generally, milestones measure concrete, specific outcomes such as deliverables.
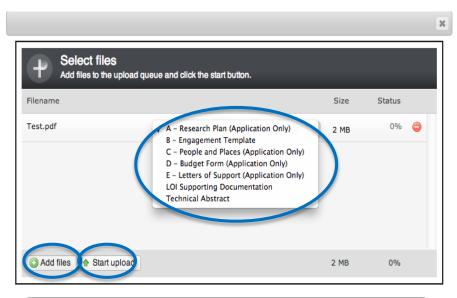
Enter milestone information, including: milestone name, description, and projected completion date. You can delete milestones by clicking on the minus sign in the top right corner, which will appear as you scroll the cursor over the entry. **You cannot edit your entry; you must delete and start over.**
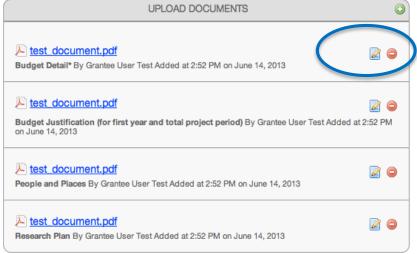
Templates and Uploads

All PFAs require additional documents to complete the application. For specific instructions, refer to the PCORI Application Guidelines found in the [PCORI Funding Center](#) for the relevant PFA type. Note that all uploads must be PDFs.
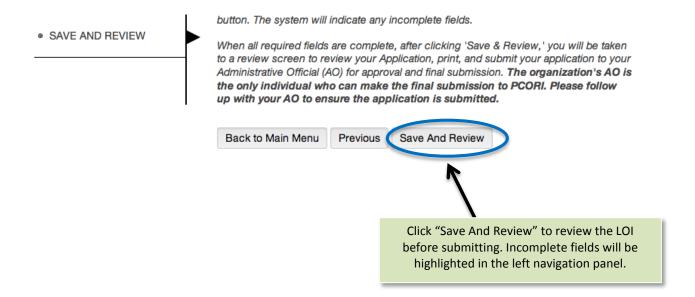
- To upload a document, click on the plus sign. Note: All uploaded files must be in PDF format.
- Click "Add files" and choose the file from your computer.
- Select the name of the required document that you are uploading from the dropdown list. If you select the wrong component and continue with the upload, you can make a correction by clicking the pen and paper icon after the upload is completed. See the second screenshot below.
- Click "Start upload."
- To delete an uploaded file, click on the minus sign.
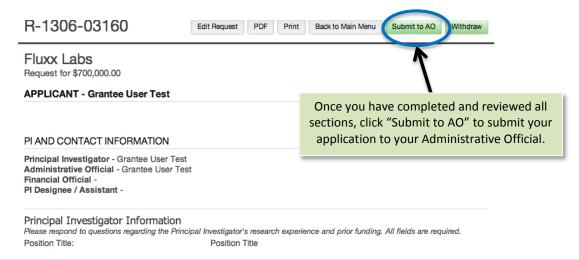
![pcori logo]

Save and Review

- Once you've completed all sections, go to the "Save and Review" tab and click the "Save and Review" button. Any incomplete sections will be highlighted in the left navigation panel, with incomplete fields marked in each section.

- If all required fields are complete, you will see a summary screen. From this screen, you can review, print, or save your application as a PDF.

• SAVE AND REVIEW

button. The system will indicate any incomplete fields.

When all required fields are complete, after clicking 'Save & Review,' you will be taken to a review screen to review your Application, print, and submit your application to your Administrative Official (AO) for approval and final submission. **The organization's AO is the only individual who can make the final submission to PCORI. Please follow up with your AO to ensure the application is submitted.**

| Back to Main Menu | Previous | Save And Review |

Click "Save And Review" to review the LOI before submitting. Incomplete fields will be highlighted in the left navigation panel.
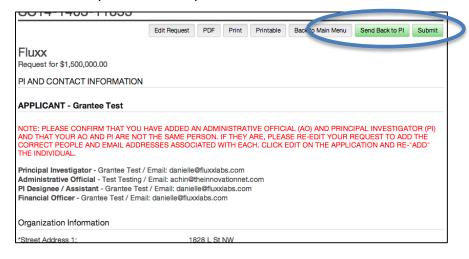
![pcori logo]

Submit to AO

Review the summary of your application. Click "Edit Request" if changes are necessary. Once complete, click the "Submit to AO" button to submit your application to the AO designated on the "PI and Project Information" tab.

Note that only the AO may submit the application to PCORI. Please contact your AO to ensure that your application was reviewed and submitted.

Once you have completed and reviewed all sections, click "Submit to AO" to submit your application to your Administrative Official.

> *Please review your Application fully. You **WILL NOT** be able to make changes after you click "Submit to AO." It is your responsibility to ensure that your AO submits the application to PCORI before the deadline.*

If changes to the application are required, the AO can release the application back to the PI. In order to do so, the AO must click the "Send Back to PI" button. The AO will need to notify the PI that an action is required on their part.

Once the AO has reviewed the application, they **must** click "Submit" in order to submit the application to PCORI.

Resources and Contact Information

- All active opportunities can be found in the [PCORI Funding Center](#)**.**
- To find application templates and any additional instructions for a specific opportunity, select the opportunity of interest in the Funding Center and review the applicant resources section of the page.
- PCORI's [Applicant FAQs](#) cover common questions that an applicant may have about PCORI and the application process. These are updated on a regular basis to reflect questions received through our helpdesk and applicant town halls.
- Applicant training materials and information about PCORI's applicant town hall sessions will be posted on PCORI's [Applicant Training](#) page. Once available, applicants will receive an email about these opportunities.
  If you have questions, please contact us at pfa@pcori.org.